

FEATURE STORY



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Symitar's documentation group started its shift to structured authoring with big ambitions. Having successfully transitioned from paper-based manuals to HTML Help years earlier, the team was excited to take the next step forward with XML. But with over 6000 HTML documents to rewrite for DITA and no Content Management System (CMS) in the budget, the documentation team knew it was facing a major challenge. Their first step was to look at an XML editor, which led it to experiment with a demo version of XMetaL Author.

Today, as the documentation team continues its progress, it's experiencing all the expected efficiency benefits of structured authoring, but also some additional ones too—the benefits of starting small, making mistakes, and learning “hands on” what you really want from a CMS before implementing one, the advantage of being perceived as a valuable service provider instead of as a cost center, and the satisfaction of transforming solitary writers into a dynamic cooperative unit.

Symitar's shift to XML cuts costs, connects writers and chops workload

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Since being acquired by Jack Henry & Associates, Inc. in 2000, Symitar has grown exponentially. And so has the workload of its technical publications department. Each year the company produces three large software updates, placing tremendous pressure on the 10-person team to keep up with changes. In the past, this has left little room for taking on strategic projects—ones that could potentially add value for the customer and for Symitar.

To address these challenges, Symitar's documentation group has been gradually shifting from an unstructured authoring system to a structured one. This involves rewriting HTML Help files as small chunks of information that can be automatically pulled together by an XML database. For Symitar's customers, this is a huge time-saver. Instead of scrolling through a long procedure for an answer, a teller will now be able to perform a simple search that returns only the specific information they need at that moment.

The benefits for Symitar's documentation team are just as dramatic. Focusing on small chunks of information rather than monolithic documents has reduced errors and saved time, freeing up team members to work on other projects for the company.

The Benefits and Tradeoffs of Starting Small

Like many companies today, Symitar wants to maximize operational efficiencies while minimizing headcount and discretionary costs. For the documentation group, this meant it had little extra money to accommodate a shift to XML-based authoring. The team's first step was to look at XML editors, and after comparing several, it ended up experimenting with a free demo of XMetaL Author.

“We did our homework, reviewing various tools, but none of them had the features we wanted or mapped to the way our writers preferred to do things,” says Kathryn Showers, the team's Information Architect. “It was an easy jump from the Adobe® Dreamweaver® interface, which everyone was familiar with, to XMetaL. It's got a lot of extras that we like too, but the main thing is that it's adapted to our user's workflow, not the other way around.”

Having an adaptable tool was critical in part because the team had no budget for a content management system. “When you're looking at a \$300,000 piece of software and you're the only department that says it needs it, you're bound to get some resistance,” says Terry Barraclough, Technical Publications Manager. And as the group soon discovered, working without a CMS requires tradeoffs.

“As we break monolithic procedures up into chunks, we're doubling and tripling the number of topics we manage. So that creates problems with audit trails, source control, versioning, checking documents in and out, things like that,” says Barraclough. “Right now that information is maintained manually or not at all, and it's very time-consuming.”

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Terry Barraclough, Technical Publications Manager, Symitar

On the plus side, starting without a CMS has helped the team understand how to properly structure their content for maximum reuse. “We’ve made lots of mistakes along the way,” says Showers. “But making mistakes is good. It clarifies your vision, sharpens your focus and tightens your standards.” It has also helped the group define what they really need in a CMS. As other departments see how XML can benefit their own processes, building a case for a company-wide CMS that can be capitalized and depreciated over time has gotten much easier.

Moving from Cost Center to Value Center

The documentation group’s success with XML has not been lost on other departments at Symitar. Being huge producers of information themselves, internal software development teams recognized the inherent advantage of having an XML-driven troubleshooting and training knowledgebase. It would help get new team members up to speed quickly and provide a valuable resource for capturing knowledge and sharing it across the company. As requests for XML expertise increase, so does the status of the technical publications department.

“This is unprecedented,” says Barraclough. “Our department is no longer looked at as the guys who write the “documentation” releases, but as the conduit for expertise in how to use XML, how to arrange information, how to automate tasks—this is a complete shift in perception.”

So what began as a documentation group project now has become a Symitar initiative. XML is no longer seen as a cost of doing business but a key lever for competitive advantage, and the documentation team is at the center of that strategy.

Shifting Authors from Isolation to Interconnection

One of the biggest challenges facing any documentation team when it starts an XML initiative is getting the writers on board. As experts in viewing the big picture as well as the finite details, writers are often anxious about switching to XML authoring. Unstructured content forces every writer to be a generalist in producing all components of a document, from writing the outline to creating the index. This produces a “top-down” approach to documents, says Barraclough, that’s tough to break. “The scariest thing for writers to do is remove information from a procedure. But users only want the information that’s relevant to their question, and it takes a while for writers to accept that.”

Structured content writing using the DITA framework, in contrast, breaks the components of a document into discrete topics, which requires starting with a “bottom-up” approach to content creation “You start with the smallest chunks of information that are commonly used and work your way up from there,” says Showers. “That way, when you make a mistake, you can go back and make a quick fix.” This approach enables teams to break into specialist roles instead of forcing everyone to be a generalist. At Symitar, this not only improved collaboration, but also morale.

For example, one team member shifted from technical writing to information architecture to ensure the overall consistency of the group’s documentation. Another person transitioned from technical writing to editing XML code for the group. As a result, the rest of the staff can spend more time writing. Project planning decisions are discussed openly at group meetings. This brings the team closer together, resulting in increased cooperation and communication.

XML Agents of Change

Symitar’s XML initiative has become much more than a documentation project. By starting small and experimenting, the documentation team learned how important planning was to a successful transition to XML. By proving the value of their expertise before they spent a lot of money on technology, it was easy for other departments to “buy-in” to a CMS. And by getting writers to accept a more collaborative, bottom-up approach to documentation, the team has increased employee morale, improved documentation quality and enhanced its status across the company.

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